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Explore the future of wealth management at ADVISE AI
By Rob Burgess
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How are advisors successfully using artificial intelligence in their practices? Where is it coming up short? And what does the future hold, especially for agentic AI?

These questions and more will be explored next month at Financial Planning's ADVISE AI conference, which will be held Oct. 28-29 at the Wynn Las Vegas.

"AI is a constantly evolving technology that continues to impact financial advisors in both positive and negative ways. This conference is an opportunity to learn how to harness AI for your benefit, as well as adapt for the cases in which it reduces web traffic, for example," said Brian Wallheimer, editor-in-chief of Financial Planning. "You'll leave ADVISE AI with usable information, solutions and resources to stay on top of the technology."

The conference will kick off with a fireside chat between Michael Kitces, head of planning strategy at Focus Partners Wealth, and Suzanne Siracuse, CEO of Suzanne Siracuse Consulting.

"I am looking forward to returning to Advise AI," said Siracuse, who held a similar session with Kitces at last year's ADVISE AI. "It's the only event where the entire wealth management community comes together to explore how AI is shaping the future of advice. I particularly love seeing the use cases and the demos to better understand how AI is freeing up advisors' time to spend more time working on client-facing activities."

The 2025 ADVISE AI conference will also feature a number of keynote speeches and panels featuring well-known figures in the industry, including Amy Young, director of industry advisory and capital markets at Microsoft; John O'Connell, founder and CEO of The Oasis Group; and Samantha Russell, chief evangelist of FMG Suite.

"There's some great content teed up for ADVISEAI on important topics like AI for marketing, AI-ready Data, AI for planning and more," said Young. "The challenge is that wealth firms already have too many apps. What they need is a vision for how AI can enable simple, but more comprehensive, experiences for advisors and clients alike. I'm excited to discuss how firms can bring it all together."

Young, a featured panelist at the first ADVISE AI, is set to deliver a session on the morning of Oct. 28 titled "Cutting Through the AI Noise: A Microsoft Perspective on What Matters for Wealth Management."

The future of AI in wealth management, with a specific focus on agentic AI

Kitces recently sat down with Diana Cabrices, founder of Diana Cabrices Consulting, for a video preview of ADVISE AI, along with the trends he's watching and what he's looking forward to at the conference.

Kitces said AI is moving the needle most significantly in the area of meeting note-takers. General solutions like Zoom, Fathom, Fireflies and Otter have gained wide adoption, along with more industry-specific players in wealth management like Jump and Zocks.

"If we have all the nicely captured meeting notes from prior meetings, we can then use that to prepare for the next meeting," he said. "And the longer we've been doing that with the clients, the more cycles of meeting prep, capture and follow-up that we get."

By contrast, Kitces said he has yet to see much movement in advisor workflows with AI. Despite the promise of agentic AI, in which an advisor assigns a complex task to an autonomous AI "agent," the technology is not yet broadly being used.

"This is much more a tool you use to help you with some things you do, as opposed to, 'I just delegate and automate and it magically goes away because AI does the thing autonomously,'" he said. "We're not seeing that. Some of that is the limitations of tech. Some of those limitations of us as advisors. We have some very specific ways that we like to see our clients served."

How advisors can tap AI for time savings and more

O'Connell of The Oasis Group will be hosting an Oct. 28 session on "AI in Action: From Portfolio Design to Client Proposals," in which he'll demonstrate how wealth managers can harness the power of today's top generative AI tools to supercharge their practice. Live on stage, O'Connell will showcase demos of AI tools such as ChatGPT, Claude and Gamma to guide advisors on how to improve their prompt engineering. He told Financial Planning he's particularly keen on the development of AI agents.

"When AI agents are deployed, they need structured environments with clear rules, inputs and authority boundaries," he said. "I'm most interested in how wealth management firms are streamlining their business processes to prepare for AI agents, and I look forward to hearing from firms how they've accomplished this while adding my thoughts to the discussion."

Looking ahead, Kitces said software that incorporates AI will be industry standard.

"You're going to see a lot more AI built into incumbent technology, and not a lot that are standalones," he told Cabrices.

ADVISE AI attendees will have the chance to learn more about how AI is being

used across wealth management. On Day 2 of the conference, sessions will cover marketing, compliance, scaling and more. Tech demos, case studies and an exhibit hall will allow advisors to explore the possibilities in depth. And cocktail receptions provide opportunities for networking and building professional relationships.

As Siracuse put it, "I just feel smarter when I leave this event and also inspired by the ideas being shared."